



# STATE OF MONTANA REQUEST FOR PROPOSAL (THIS IS NOT AN ORDER)

**RFP Number:**  
RFP 060157

**RFP Title:**  
PROFESSIONAL MARKETING SERVICES FOR MONTANA STATE PARKS

**RFP Due Date and Time:**  
Wednesday, February 01, 2006  
2 p.m., Local Time

**Number of Pages:** 49

## ISSUING AGENCY INFORMATION

**Procurement Officer:**  
SALLY BYRD

**Issue Date:**  
1/10/06

**Montana Fish, Wildlife & Parks**  
P.O. Box 200701  
Helena, MT 59620-0701

Phone: (406) 495-3249  
Fax: (406) 495-3253  
TTY Users, Dial 711

## INSTRUCTIONS TO OFFERORS

**Return Proposal to:**

RFP #06157 Marketing Due 02/01/06  
Montana Fish, Wildlife & Parks  
Purchasing Unit  
P.O. Box 200701  
Helena, MT 59620-0701

**Mark Face of Envelope/Package:**

RFP Number: 060157  
RFP Due Date: 02/01/06

**Special Instructions:**

**IMPORTANT: SEE STANDARD TERMS AND CONDITIONS**

## OFFERORS MUST COMPLETE THE FOLLOWING

**Offeror Name/Address:**

**Authorized Offeror Signatory:**

(Please print name and sign in ink)

**Offeror Phone Number:**

**Offeror FAX Number:**

**Offeror Federal I.D. Number:**

**Offeror E-mail Address:**

**OFFERORS MUST RETURN THIS COVER SHEET WITH RFP RESPONSE**

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## OFFEROR'S RFP CHECKLIST

### The 10 Most Critical Things to Keep in Mind When Responding to an RFP for the State of Montana

1. \_\_\_\_\_ **Read the entire document.** Note critical items such as: mandatory requirements; supplies/services required; submittal dates; number of copies required for submittal; funding amount and source; contract requirements (i.e., contract performance security, insurance requirements, performance and/or reporting requirements, etc.).
2. \_\_\_\_\_ **Note the procurement officer's name, address, phone numbers and e-mail address.** This is the only person you are allowed to communicate with regarding the RFP and is an excellent source of information for any questions you may have.
3. \_\_\_\_\_ **Attend the pre-proposal conference** if one is offered. These conferences provide an opportunity to ask clarifying questions, obtain a better understanding of the project, or to notify the State of any ambiguities, inconsistencies, or errors in the RFP.
4. \_\_\_\_\_ **Take advantage of the “question and answer” period.** Submit your questions to the procurement officer by the due date listed in the Schedule of Events and view the answers given in the formal “addenda” issued for the RFP. All addenda issued for an RFP are posted on the GSD website and will include all questions asked and answered concerning the RFP.
5. \_\_\_\_\_ **Follow the format required in the RFP** when preparing your response. Provide point-by-point responses to all sections in a clear and concise manner.
6. \_\_\_\_\_ **Provide complete answers/descriptions.** Read and answer **all** questions and requirements. Don't assume the State or evaluation committee will know what your company capabilities are or what items/services you can provide, even if you have previously contracted with the State. The proposals are evaluated based solely on the information and materials provided in your response.
7. \_\_\_\_\_ **Use the forms provided**, i.e., cover page, sample budget form, certification forms, etc.
8. \_\_\_\_\_ **Check the FWP website for RFP addenda.** Before submitting your response, check the FWP website at <http://www.FWP.mt.gov> to see whether any addenda were issued for the RFP. If so, you must submit a signed cover sheet for each addendum issued along with your RFP response.
9. \_\_\_\_\_ **Review and read the RFP document again** to make sure that you have addressed all requirements. Your original response and the requested copies must be identical and be complete. The copies are provided to the evaluation committee members and will be used to score your response.
10. \_\_\_\_\_ **Submit your response on time.** Note all the dates and times listed in the Schedule of Events and within the document, and be sure to submit all required items on time. Late proposal responses are never accepted.

**This checklist is provided for assistance only and should not be submitted with Offeror's Response.**

## SCHEDULE OF EVENTS

<u>EVENT</u>	<u>DATE</u>
RFP Issue Date .....	January 10, 2006
Deadline for Receipt of Written Questions .....	January 18, 2006
Deadline for Posting of Written Answers to GSD Website .....	January 23, 2006
RFP Response Due Date .....	February 01, 2006
Evaluation Committee Meeting .....	Week of February 6, 2006
Notification of Offeror Oral Presentations .....	Week of February 13, 2006
Offeror Oral Presentations .....	Week of February 20, 2006
Intended Date for Contract Award .....	Week of February 27, 2006

## SECTION 1: PROJECT OVERVIEW AND INSTRUCTIONS

### 1.0 PROJECT OVERVIEW

The STATE OF MONTANA, Department of Fish, Wildlife & Parks, Parks Division, (hereinafter referred to as “the State”) invites you to submit a proposal for Professional Marketing Services for Montana State Parks to work as a collaborative partner in the development and implementation of a comprehensive branding strategy to communicate the benefits and values of Montana State Parks in accordance with the State Parks Outreach and Partnership Plan. The anticipated term of the contract is March 1, 2006, through March 1, 2007. A more complete description of the services sought for this project is provided in Section 3, Scope of Project. Proposals submitted in response to this solicitation must comply with the instructions and procedures contained herein.

### 1.1 SINGLE POINT OF CONTACT

From the date this Request for Proposal (RFP) is issued until an offeror is selected and the selection is announced by the procurement officer, **offerors are not allowed to communicate with any state staff or officials regarding this procurement, except at the direction of Sally Byrd**, the procurement officer in charge of the solicitation. Any unauthorized contact may disqualify the offeror from further consideration. Contact information for the single point of contact is as follows:

Procurement Officer: Sally Byrd  
Address: 930 Custer Avenue  
P.O. Box 200701  
Helena, MT 59620-0701  
Telephone Number: (406) 495-3249  
Fax Number: (406) 495-3253  
E-mail Address: sbyrd@mt.gov

### 1.2 REQUIRED REVIEW

**1.2.1 Review RFP.** Offerors should carefully review the instructions, mandatory requirements, specifications, standard terms and conditions, and standard contract set out in this RFP and promptly notify the procurement officer identified above in writing or via e-mail of any ambiguity, inconsistency, unduly restrictive specifications, or error which they discover upon examination of this RFP.

**1.2.2 Form of Questions.** Offerors with questions or requiring clarification or interpretation of any section within this RFP must address these questions in writing or via e-mail to the procurement officer referenced above on or before **Wednesday, January 18, 2006**. Each question must provide clear reference to the section, page, and item in question. Questions received after the deadline may not be considered.

**1.2.3 State's Answers.** The State will provide an official written answer to all questions received by **Friday, January 18, 2006**. The State's response will be by formal written addendum. Any other form of interpretation, correction, or change to this RFP will not be binding upon the State. Any formal written addendum will be posted on the General Services Division's website alongside the posting of the RFP at <http://www.FWP.mt.gov> by the close of business on the date listed. Offerors must sign and return any addendum with their RFP response.

**1.2.4 Standard Terms and Conditions/Standard Contract.** By submitting a response to this RFP, offeror agrees to acceptance of the standard terms and conditions and standard contract as set out in Appendices A and B of this RFP. Much of the language included in the standard terms and conditions and standard contract reflects requirements of Montana law. Requests for exceptions to the standard terms and

conditions, standard contract terms, or any added provisions must be submitted to the procurement officer referenced above by the date for receipt of written/e-mailed questions or with the offeror's RFP response and must be accompanied by an explanation of why the exception is being taken and what specific effect it will have on the offeror's ability to respond to the RFP or perform the contract. The State reserves the right to address non-material, minor, insubstantial requests for exceptions with the highest scoring offeror during contract negotiation. Any material, substantive, important exceptions requested and granted to the standard terms and conditions and standard contract language will be addressed in any formal written addendum issued for this RFP and will apply to all offerors submitting a response to this RFP.

**1.2.5 Mandatory Requirements.** To be eligible for consideration, an offeror ***must*** meet the intent of all mandatory requirements. The State will determine whether an offeror's RFP response complies with the intent of the requirements. RFP responses that do not meet the full intent of all requirements listed in this RFP may be subject to point reductions during the evaluation process or may be deemed non-responsive.

## **1.3 SUBMITTING A PROPOSAL**

**1.3.1 Organization of Proposal.** Offerors must organize their proposal into sections that follow the format of this RFP, with tabs separating each section. Proposals must be submitted on 8 ½" x 11" paper, in Arial size 11 font, and bound in standard three-ring binders. Pages should be numbered and printed on both sides of a page (when possible). A point-by-point response to all numbered sections, subsections, and appendices is required. If no explanation or clarification is required in the offeror's response to a specific subsection, the offeror shall indicate so in the point-by-point response or utilize a blanket response for the entire section with the following statement:

**"(Offeror's Name)" understands and will comply.**

**Proposals should be prepared simply and economically, providing a clear and concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content.**

**Binders and Marketing Samples should be packaged in nothing more elaborate than mailing envelopes or cardboard boxes for shipment or delivery to the Purchasing Unit of Fish Wildlife and Parks, P O Box 200701-0701, 930 Custer Ave, Helena MT 59620.**

**In addition, one copy of the written proposal should be submitted on a PC-formatted Microsoft Word CD-ROM.**

**1.3.2 Failure to Comply with Instructions.** Offerors failing to comply with these instructions may be subject to point deductions. The State may also choose to not evaluate, may deem non-responsive, and/or may disqualify from further consideration any proposals that do not follow this RFP format, are difficult to understand, are difficult to read, or are missing any requested information.

**1.3.3 Multiple Proposals.** Offerors may, at their option, submit multiple proposals, in which case each proposal shall be evaluated as a separate document.

**1.3.4 Copies Required and Deadline for Receipt of Proposals.** Offerors must submit one original proposal and five copies to the Fish, Wildlife & Parks Purchasing Officer. One additional copy of the written proposal should be submitted on a PC-formatted Microsoft Word CD-ROM. Only five sets of "Sample Marketing Campaigns" from Section 4.1.4 are necessary. ***Proposals must be received by the purchasing unit prior to 2 p.m., local time, Wednesday, February 01, 2006. Facsimile responses to requests for proposals are ONLY accepted on an exception basis with prior approval of the purchasing officer.***

**1.3.5 Late Proposals.** ***Regardless of cause, late proposals will not be accepted and will automatically be disqualified from further consideration.*** It shall be the offeror's sole risk to assure delivery

at the receptionist's desk at the designated office by the designated time. Late proposals will not be opened and may be returned to the offeror at the expense of the offeror or destroyed if requested.

## **1.4 OFFEROR'S CERTIFICATION**

**1.4.1 Understanding of Specifications and Requirements.** By submitting a response to this RFP, offeror agrees to an understanding of and compliance with the specifications and requirements described in this RFP.

**1.4.2 Offeror's Signature.** The proposals must be signed in ink by an individual authorized to legally bind the business submitting the proposal. The offeror's signature on a proposal in response to this RFP guarantees that the prices quoted have been established without collusion and without effort to preclude the State of Montana from obtaining the best possible supply or service. Proof of authority of the person signing the RFP response must be furnished upon request.

**1.4.3 Offer in Effect for 120 Days.** A proposal may not be modified, withdrawn or canceled by the offeror for a 120-day period following the deadline for proposal submission as defined in the Schedule of Events, or receipt of best and final offer, if required, and offeror so agrees in submitting the proposal.

## **1.5 COST OF PREPARING A PROPOSAL**

**1.5.1 State Not Responsible for Preparation Costs.** The costs for developing and delivering responses to this RFP and any subsequent presentations of the proposal as requested by the State are entirely the responsibility of the offeror. The State is not liable for any expense incurred by the offeror in the preparation and presentation of their proposal.

**1.5.2 All Timely Submitted Materials Become State Property.** All materials submitted in response to this RFP become the property of the State and are to be appended to any formal documentation, which would further define or expand any contractual relationship between the State and offeror resulting from this RFP process.



## **SECTION 2: RFP STANDARD INFORMATION**

### **2.0 AUTHORITY**

This RFP is issued under the authority of section 18-4-304, MCA (Montana Code Annotated) and ARM 2.5.602 (Administrative Rules of Montana). The RFP process is a procurement option allowing the award to be based on stated evaluation criteria. The RFP states the relative importance of all evaluation criteria. No other evaluation criteria, other than as outlined in the RFP, will be used.

### **2.1 OFFEROR COMPETITION**

The State encourages free and open competition among offerors. Whenever possible, the State will design specifications, proposal requests, and conditions to accomplish this objective, consistent with the necessity to satisfy the State's need to procure technically sound, cost-effective services and supplies.

### **2.2 RECEIPT OF PROPOSALS AND PUBLIC INSPECTION**

**2.2.1 Public Information.** All information received in response to this RFP, including copyrighted material, is deemed public information and will be made available for public viewing and copying shortly after the time for receipt of proposals has passed with the following four exceptions: (1) bona fide trade secrets meeting the requirements of the Uniform Trade Secrets Act, Title 30, chapter 14, part 4, MCA, that have been properly marked, separated, and documented; (2) matters involving individual safety as determined by the Department of Administration; (3) any company financial information requested by the Department of Administration to determine vendor responsibility, unless prior written consent has been given by the offeror as set out in section 18-4-308, MCA; and (4) other constitutional protections. See Mont. Code Ann. § 18-4-304.

**2.2.2 Procurement Officer Review of Proposals.** Upon opening the proposals received in response to this RFP, the procurement officer in charge of the solicitation will review the proposals and separate out any information that meets the referenced exceptions in Section 2.2.1 above, providing the following conditions have been met:

- Confidential information is clearly marked and separated from the rest of the proposal.
- The proposal does not contain confidential material in the cost or price section.
- An affidavit from an offeror's legal counsel attesting to and explaining the validity of the trade secret claim as set out in Title 30, chapter 14, part 4, MCA, is attached to each proposal containing trade secrets. Counsel must use the State of Montana "Affidavit for Trade Secret Confidentiality" form in requesting the trade secret claim. This affidavit form is available on the General Services Division's website at: <http://www.discoveringmontana.com/doa/gsd/css/Resources/Forms.asp> or by calling (406) 444-2575.

Information separated out under this process will be available for review only by the procurement officer, the evaluation committee members, and limited other designees. Offerors must be prepared to pay all legal costs and fees associated with defending a claim for confidentiality in the event of a "right to know" (open records) request from another party.

### **2.3 CLASSIFICATION AND EVALUATION OF PROPOSALS**

**2.3.1 Initial Classification of Proposals as Responsive or Nonresponsive.** All proposals will initially be classified as either "responsive" or "nonresponsive," in accordance with ARM 2.5.602. Proposals may be found nonresponsive any time during the evaluation process or contract negotiation if any of the required information is not provided; the submitted price is found to be excessive or inadequate as measured

by criteria stated in the RFP; or the proposal is not within the plans and specifications described and required in the RFP. If a proposal is found to be nonresponsive, it will not be considered further.

**2.3.2 Determination of Responsibility.** The procurement officer will determine whether an offeror has met the standards of responsibility in accordance with ARM 2.5.407. Such a determination may be made at any time during the evaluation process and through contract negotiation if information surfaces that would result in a determination of nonresponsibility. If an offeror is found nonresponsive, the determination must be in writing, made a part of the procurement file and mailed to the affected offeror.

**2.3.3 Evaluation of Proposals.** The evaluation committee will evaluate the remaining proposals and recommend whether to award the contract to the highest scoring offeror or, if necessary, to seek discussion/negotiation or a best and final offer in order to determine the highest scoring offeror. All responsive proposals will be evaluated based on stated evaluation criteria. In scoring against stated criteria, the State may consider such factors as accepted industry standards and a comparative evaluation of all other qualified RFP responses in terms of differing price, quality, and contractual factors. These scores will be used to determine the most advantageous offering to the State.

**2.3.4 Completeness of Proposals.** Selection and award will be based on the offeror's proposal and other items outlined in this RFP. Submitted responses may not include references to information located elsewhere, such as Internet websites or libraries, unless specifically requested. Information or materials presented by offerors outside the formal response or subsequent discussion/negotiation or "best and final offer," if requested, will not be considered, will have no bearing on any award, and may result in the offeror being disqualified from further consideration.

**2.3.5 Achieve Passing Score.** Any proposal that fails to achieve a passing score for any part/section for which a passing score is indicated will be eliminated from further consideration.

**2.3.6 Opportunity for Discussion/Negotiation and/or Oral Presentation/Product Demonstration.** After receipt of all proposals and prior to the determination of the award, the State may initiate discussions with one or more offerors should clarification or negotiation be necessary. Offerors may also be required to make an oral presentation and/or product demonstration to clarify their RFP response or to further define their offer. In either case, offerors should be prepared to send qualified personnel to Helena, Montana, to discuss technical and contractual aspects of the proposal. Oral presentations and product demonstrations, if requested, shall be at the offeror's expense.

**2.3.7 Best and Final Offer.** The "Best and Final Offer" is an option available to the State under the RFP process which permits the State to request a "best and final offer" from one or more offerors if additional information is required to make a final decision. Offerors may be contacted asking that they submit their "best and final offer," which must include any and all discussed and/or negotiated changes. The State reserves the right to request a "best and final offer" for this RFP, if any, based on price/cost alone.

**2.3.8 Evaluation Committee Recommendation for Contract Award.** The evaluation committee will provide a written recommendation for contract award to the procurement officer that contains the scores, justification and rationale for its decision. The procurement officer will review the recommendation to ensure its compliance with the RFP process and criteria before concurring in the evaluation committee's recommendation.

**2.3.9 Request for Documents Notice.** Upon concurrence with the evaluation committee's recommendation for contract award, the procurement officer will issue a "Request for Documents Notice" to the highest scoring offeror to obtain the required insurance documents, contract performance security, and any other necessary documents. Receipt of the "Request for Documents Notice" does not constitute a contract and no work may begin until a contract signed by all parties is in place. The procurement officer will notify all other offerors of the State's intent to begin contract negotiation with the highest scoring offeror.

**2.3.10 Contract Negotiation.** Upon issuance of the “Request for Documents Notice,” the procurement officer and/or state agency representatives may begin contract negotiation with the responsive and responsible offeror whose proposal achieves the highest score and is, therefore, the most advantageous to the State. If contract negotiation is unsuccessful or the highest scoring offeror fails to provide necessary documents or information in a timely manner, or fails to negotiate in good faith, the State may terminate negotiations and begin negotiations with the next highest scoring offeror.

**2.3.11 Contract Award.** Contract award, if any, will be made to the highest scoring offeror who provides all required documents and successfully completes contract negotiation. A formal contract utilizing the Standard Contract attached as Appendix B and incorporating the Standard Terms and Conditions attached as Appendix A will be executed by all parties.

## **2.4 STATE’S RIGHTS RESERVED**

While the State has every intention to award a contract as a result of this RFP, issuance of the RFP in no way constitutes a commitment by the State of Montana to award and execute a contract. Upon a determination such actions would be in its best interest, the State, in its sole discretion, reserves the right to:

- cancel or terminate this RFP (Mont. Code Ann. § 18-4-307, MCA);
- reject any or all proposals received in response to this RFP (ARM 2.5.602);
- waive any undesirable, inconsequential, or inconsistent provisions of this RFP which would not have significant impact on any proposal (ARM 2.5.505);
- not award if it is in the best interest of the State not to proceed with contract execution (ARM 2.5.602); or
- if awarded, terminate any contract if the State determines adequate state funds are not available (Mont. Code Ann. § 18-4-313).

## SECTION 3: SCOPE OF PROJECT

### **3.0 INTRODUCTION**

The Parks Division of Montana Department of Fish, Wildlife & Parks, herein referred to as the State, is seeking the professional services of a marketing agency to work as a collaborative partner in the development and implementation of a comprehensive branding program to communicate the benefits and value of Montana State Parks in accordance with the State Parks Outreach and Partnership Plan.

### **3.1 BACKGROUND**

The mission of Montana State Parks is three-fold: conserve a representative diversity of the state's natural, cultural and recreational amenities; provide resource education and interpretation; and help facilitate sustainable economic development through tourism.

The Parks Division currently manages 50 diverse parks, over 300 fishing access sites, and a trails and grants program providing approximately \$3 million for recreational opportunities throughout the state.

The State Parks Futures II Committee appointed by Governor Judy Martz in October 2001 reviewed the operations, structure, and management of state parks and made specific recommendations for improvement of the state park system. Among its recommendations was the formation of a marketing plan to convey the parks' value and benefits so that the public becomes increasingly connected to these places and so that support grows for their continued preservation.

In order to market the parks in a manner consistent with the mission statement, an Outreach and Partnership Plan was developed. The plan, found in the Appendix and at <http://fwp.mt.gov/content/getItem.aspx?id=11294>, outlines steps to strengthen the connections between state parks, park users, businesses, and communities to ensure the long-term viability of the parks.

### **3.2 SPECIFICATIONS AND REQUIREMENTS**

**3.2.1 Expectations.** The State is undertaking this competitive process with the intention of selecting an agency that offers the combination of experience, strategic planning, financial stability and creativity with a competitive cost structure. The prospective agency should have the resources to make available to the State, a qualified team who will perform the work outlined in this RFP.

The State Parks Outreach and Partnership Plan contains specific goals of building identity and increasing awareness of state parks; directing visitors to underutilized parks and increasing park visitation at off-peak times; and developing strategic partnerships with organizations and communities. The State is looking for an agency that will partner with them in these challenges bringing fresh ideas and innovative approaches.

**3.2.2 Scope of Work.** The highest scoring offeror shall be expected to complete the Scope of Work below:

- Develop a brand architecture system that is in alignment with the mission, vision, values and personality of the Parks Division.
- At the direction of the State and in conjunction with the objectives of the Parks Outreach and Partnership plan, analyze and recommend specific strategies to execute the branding in all the marketing and public relations efforts and touch points of the Division.

- Assist the State in developing strategies to uniquely position the parks in the minds of the consumer that includes: identification of target markets; specific strategies that include measurable objectives for each target market; and tactics to achieve these objectives. Awareness and integration of components from the Montana State Parks Outreach and Partnership Plan is expected.
- Assist the State in developing an integrated marketing program including but not limited to advertising, cooperative marketing, internet marketing, public relations, sponsorships and direct marketing including creation, preparation, and placement of advertising in various media.
- With assistance from the State, develop an annual program in which potential marketing and advertising partners are identified and strategies specified for generating new partnership funds or leveraging the State's funds to extend Park's marketing reach and frequency.
- Propose marketing and public relations strategies to expand promotional efforts effectively into new target markets within Montana. Provide public relations/publicity support in the execution of those strategies.

### **3.3 WORKING RELATIONSHIP**

The State intends to have a close working relationship with the highest scoring offeror. While it is not a prerequisite that the offeror have an office in Helena, it is expected that key personnel be available for meetings in Helena as needed at their own expense, and available via telephone and e-mail. The State will require the successful offeror to provide: (1) budget estimates on all project proposals; and (2) an opportunity for the State to review all draft materials. The State's final approval will be required on all proposals undertaken on its behalf. It is also expected that the State be kept informed as to the status and progress of all approved projects through completion.

## **SECTION 4: OFFEROR QUALIFICATIONS**

### **4.0 STATE'S RIGHT TO INVESTIGATE**

The State may make such investigations as deemed necessary to determine the ability of the offeror to provide the supplies and/or perform the services specified.

### **4.1 OFFEROR INFORMATIONAL REQUIREMENTS**

In determining the capabilities of an offeror to perform the services specified herein, the following informational requirements must be met by the offeror. **(Note: Each item must be thoroughly addressed. Offerors taking exception to any requirements listed in this section may be found non-responsive or be subject to point deductions.)**

#### **4.1.1 References.**

- Offeror shall provide a minimum of three references that are using services of the type proposed in this RFP.
- The references should, if possible, include any experience in developing and implementing an integrated tourism marketing campaign or branding campaign.
- The offeror shall provide the company or agency name, the location where the services were provided, contact person(s), customer telephone number, a complete description of the services performed, and dates the services were provided.
- The offeror shall provide annual dollar value of services.
- The offeror shall provide the size of the account in terms of percent of offeror's total business.
- The State reserves the right to use any information or additional references deemed necessary to establish the ability of the offeror to perform the conditions of the contract. Negative references may be grounds for proposal disqualification.

#### **4.1.2 Resumes/Company Profile, Experience and Client History.**

- Offeror shall specify how long the individual/company submitting the proposal has been a full-service advertising/marketing agency and how long they have been in the business of providing professional advertising and/or marketing consultation services similar to those requested in this RFP.
- Offeror should list the location(s) of the office(s) from which the primary work on this contract would be performed and any other satellite offices that may be utilized.
- Offeror should describe the structure of the organization including any board of directors, partners, etc.
- Offeror should include proposed staffing and organization of personnel to be assigned to this account and provide answers to the following information requests concerning the qualifications and experience of all executive, managerial and professional personnel to be assigned to this contract.
- The information provided should include resumes that cite experience with similar projects and the responsibilities to be assigned to each person.

##### **4.1.2.1 Account Manager.**

- Identify one individual who will manage the contract work.
- Document overall experience in branding and tourism marketing.
- Provide detail on the Account Manager's experience, education, affiliations, memberships, awards, and recognitions received for similar services.
- Define this individual's work ethic and philosophy.

- Described the Account Manager's planned duties servicing this account.
- Define the percent of the Account Manager's time devoted exclusively to managing the State's account.

#### **4.1.2.2 Account Team.**

- Identify by name, title and role each proposed team member on the State's account.
- Include relevant experience, including that which may be outside of your agency and/or outside the advertising/marketing field.
- Identify individual experience in destination, travel, and/or niche tourism marketing.
- Identify specifically, what percentage of the firm's total effort will be provided by various team members.

#### **4.1.2.3 Business/Marketing Philosophy.**

- Detail your agency's business and marketing philosophies.
- Describe your agency's work environment and internal culture.
- Describe your philosophy on outdoor recreation.

#### **4.1.2.6 Client History.**

- The offeror should provide the following information about client history:
  - Total number of current accounts with total annual billing amount.
  - Largest current account with annual billing amount.
  - Smallest current account with annual billing amount.
  - Percentage of client accounts falling in the following annual billing categories:
    - Greater than \$100,000
    - \$50,000 - \$100,000
    - Less than \$50,000
  - Three current largest clients, the date of their acquisition and the proportion of total billings represented by these accounts.
  - The most significant accounts the offeror has added over the past three years and the most significant accounts the offeror has lost over the past three years. Provide an explanation for each acquisition or loss.

### **4.1.3 Method of Providing Service.**

- The offeror should specifically describe in detail the following in-house services:
  - Brand architecture and implementation – Offeror should describe capability and/or experience in developing the brand of a company or organization aligning with the mission, values, strengths and weaknesses of that organization.
  - Co-op partnerships – Offeror should describe capability and/or experience in soliciting, managing, and providing quality assurance in leveraging a client's resources utilizing co-op partnerships, sponsorships, or other means.
  - Public relations – Offeror should describe at least one public relations/promotional project of a statewide or regional scope within the last two years.
  - Offeror should provide description and examples of forms for client reporting methods.
  - Offeror should provide a list of in-house production capabilities (listing related equipment and software). (Informational only.)

#### **4.1.3.1 Research.**

- Discuss how the State's university research, sub-contracted research and other research studies will be integrated or incorporated into overall marketing strategies.

- Detail any agency experience in managing and/or conducting research projects.

#### **4.1.4 Samples of Marketing Campaigns.**

- The offeror should provide a maximum of two samples of marketing campaigns which are of similar scope and budget as this proposal. The components of the program must be detailed and specific.
  - Provide an explanation of what the campaign was designed to accomplish.
    - In addition, the offeror shall also provide a description of strategic goals of the campaign and the offeror's involvement in developing the strategic direction.
- Provide budget information including annual media billings where applicable.
- Provide measurable outcomes of the campaign describing the various methods and means for measuring the effectiveness of the marketing campaign including return on investment (ROI).
- For the samples provided, identify the personnel responsible for the campaign components and cross-reference how the person is proposed to be utilized for the State campaign.

#### **4.1.5 Creative Implementation – Written Response.**

- After reviewing the State Parks Outreach and Partnership Plan, the offeror should address how the limited resources would be allocated to accomplish the tasks outlined in the plan. The offeror should provide a strategy that they feel best serves the State given the resources available and explain why these strategies were selected.
- One of the greatest challenges faced when marketing State Parks is to create a unified identity out of fifty incredibly diverse destinations. The offeror should prepare a written response that describes the process the offeror would employ to define the market niche and/or create a slogan or brand that defines Montana State Parks.
- A specific strategy outlined in the Outreach and Partnership Plan calls for the creation of a series of cultural arts fairs to be held at several parks around the state. Offeror should describe potential partners, community involvement or other strategies for gaining the greatest impact from these events.

**Speculative creative work is not a required component of the Solution Presentation. The State reserves the right to implement standard industry methods present in the public domain in future marketing endeavors.**

#### **4.1.6 Additional Offeror/Firm Information.**

- The offeror should use this opportunity to share any additional information about themselves or firm that has not been directly covered in the RFP but is relevant to their ability to service this account.



## SECTION 5: COST PROPOSAL

### 5.0 COST PROPOSAL

The anticipated annual budget for the professional advertising and consultation services detailed herein is approximately \$25,000 for the first term of this contract.

### 5.1 BILLABLE HOUR/SERVICE

List all services for which you charge and the amount per billable hour you would charge for the initial 12-month contract term. Include all items on the worksheet provided and any others that are relevant to the proposal that the State would be expected to pay. \*Cost charged for items marked with asterisk must be supplied.

Service Provided	\$ Amount per Hour
*Account Management	
Copywriting/Editing	
Creative Concepting	
*Design/Layout	
Broadcast Direction/Supervision	
Market Research and Analysis	
Media Research/Buying	
• Commissionable media	
• Non-commissionable media	
*Public Relations Management	
Proofreading	
Print Supervision/Quality Control	
Mechanical Art Direction	
Accounting	
Budget Research and Estimates	
Travel time to attend meetings at State's request outside of Helena	
• Travel Time	
• Out-of-pocket expenses (lodging, meals, etc.)	
• Meeting time (agency and State benefit)	
• Meeting time (State benefit)	
Costs associated with subcontracted work	
Others (please list where appropriate)	

### 5.2 NON-BILLABLE SERVICES

List all services for which you do not charge with an explanation of how non-billable services are determined.

## SECTION 6: EVALUATION CRITERIA

### 6.0 EVALUATION CRITERIA

The evaluation committee will evaluate the proposals in a **two-stage process**. **Stage One** will consist of a **scored process based on the submitted proposals** as described in Section 6.1. Highest scoring offerors will proceed to Stage Two, which will consist of an oral interview. A maximum of two people will be invited to participate in the interview. One of the individuals participating in the Stage Two oral interview must be the person designated in the proposal as the account manager.

**6.0.1 Ability to Waive Stage Two.** The evaluation committee reserves the right to waive the Stage Two portion of the evaluation if one proposal has a score that is 30 points higher than the next scoring offeror. In that instance the State may proceed immediately to final negotiations before awarding a contract.

**6.0.2 Scoring Procedure.** For each finalist, total points for written responses, as scored by the evaluation committee, and total points for the oral interview will be combined into one total. The contract will be awarded to the finalist with the highest combined total.

The evaluation committee will review and evaluate the offers according to the following criteria:

### 6.1 STAGE ONE EVALUATION CRITERIA

Based on a maximum possible value of **600 points**, the evaluation committee will review and evaluate the offers according to the following criteria:

Company Qualifications			possible 60
Category	Section of RFP		Point Value
A. References	4.1.1		Pass/Fail
B. Experience similar to contract needs	4.1.2		20
C. Experience of Account Manager	4.1.2.1		10
D. Experience of Account Team	4.1.2.2		15
E. Experience in accounts financially similar in size to the State Parks' account	4.1.2.6		10
F. Standing, strength and financial viability of the offeror	4.1.2.6		5

  

Method of Providing Services			possible 60
Category	Section of RFP		Point Value
A. Experience in brand architecture	4.1.3		20
B. Experience in media research/buying	4.1.3		5
C. Experience with co-op partnerships	4.1.3		15
D. Public Relations experience	4.1.3		15
E. Client reporting methods	4.1.3		5

  

Marketing Campaigns			possible 90
Category	Section of RFP		Point Value
A. Creative approach	4.1.4		30 (15 pts. each)
B. Strategic planning and involvement	4.1.4		20 (10 pts. each)
C. Measurable outcomes/results	4.1.4		20 (10 pts. each)

D.	Variety and strength of advertising components	4.1.4	20
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<b>Creative Implementation</b>		<b>possible 190</b>	
<b>Category</b>		<b>Section of RFP</b>	<b>Point Value</b>
A.	Strategic approach/planning	4.1.5	70
B.	Allocation of resources	4.1.5	50
C.	Branding concept	4.1.5	45
D.	Partnership ideas	4.1.5	25

<b>Additional Offeror /Firm Information</b>		<b>possible 30</b>	
<b>Category</b>		<b>Section of RFP</b>	<b>Point Value</b>
A.	Demonstrates a strong understanding of what is required and needed to provide the utmost service to this contract	4.1.6	30

<b>Cost for Services</b>		<b>possible 120</b>	
<b>Category</b>		<b>Section of RFP</b>	<b>Point Value</b>
A.	Offeror cost for billable services	5.1	60
B.	Non-billable services	5.2	60

<b>Written Proposal</b>		<b>possible 50</b>	
<b>Category</b>		<b>Section of RFP</b>	<b>Point Value</b>
A.	Offeror's written response to this RFP will be evaluated in its entirety in terms of completeness, responsiveness, clarity, quality of writing and overall layout. Points will be deducted if proposals do not comply with the requirements set out in Section 1.3		50

## **6.2 STAGE TWO EVALUATION CRITERIA**

Based on a maximum possible value of **200 points**, the evaluation committee will review and evaluate the Stage Two proposals according to the following criteria:

<b>Oral Interview</b>		<b>possible 200</b>	
<b>Category</b>			<b>Point Value</b>
A.	Ability to demonstrate an understanding of the Montana tourism market		40
B.	Ability to articulate and expound on the Creative Implementation strategy		40
C.	Ability to articulate the offeror's capabilities		40
D.	Ability to address evaluation committee questions		40
E.	Delivery, creativity and professionalism of presentation		40

## **SECTION 7: STANDARD CONTRACT INFORMATION**

### **7.0 STANDARD TERMS AND CONDITIONS**

The State's standard terms and conditions are attached to this document as Appendix A. Offerors should notify the State of any terms within the standard terms and conditions that either preclude them from responding to the RFP or add unnecessary cost. This notification must be made by the deadline for receipt of written/e-mailed questions or with the offeror's RFP response. Any requests for material, substantive, important exceptions to the standard terms and conditions will be addressed in any formal written addendum issued by the procurement officer in charge of the solicitation. The State reserves the right to address any non-material, minor, insubstantial exceptions to the standard terms and conditions with the highest scoring offeror at the time of contract negotiation.

### **7.1 STANDARD CONTRACT**

The State's standard contract is attached to this document as Appendix B. Offerors should notify the State of any terms within the standard contract that either preclude them from responding to the RFP or add unnecessary cost. This notification must be made by the deadline for receipt of written/e-mailed questions or with the offeror's RFP response. Any requests for material, substantive, important exceptions to the standard contract will be addressed in any formal written addendum issued by the procurement officer in charge of the solicitation. The State reserves the right to address any non-material, minor, insubstantial exceptions to the standard contract with the highest scoring offeror at the time of contract negotiation.

### **7.2 ADDITIONAL CONTRACT PROVISIONS AND TERMS**

This RFP and any addenda, the offeror's RFP response, including any amendments, a best and final offer, any clarification question responses, and any negotiations shall be included in any resulting contract. The State's standard contract, attached as Appendix B, contains the contract terms and conditions which will form the basis of any contract negotiated between the State and the highest scoring offeror. The contract language contained in Appendix B does not define the total extent of the contract language that may be negotiated. In the event of a dispute as to the duties and responsibilities of the parties under this contract, the contract, along with any attachments prepared by the State, will govern in the same order of precedence as listed in the contract.

### **7.3 CONTRACT TERM**

The contract term is for a period of one year beginning March 1, 2006, and ending March 1, 2007. Renewals of the contract, by mutual agreement of both parties, may be made at one-year intervals, or any interval that is advantageous to the State, not to exceed a total of four, at the option of the State.

### **7.4 COST/PRICE INCREASE**

**7.4.1. Price Increases Negotiated Based on Increases in Contractor's Costs.** Price increases may be permitted at the time of contract renewal through a process of negotiation with the Contractor and the State. Any price increases must be based on demonstrated industry-wide or regional increases in the Contractor's costs. Publications such as the Federal Bureau of Labor Statistics and the Consumer Price Index (CPI) for all Urban Consumers may be used to determine the increased value.

## **7.5 SUBCONTRACTORS**

The highest scoring offeror will be the prime contractor if a contract is awarded and shall be responsible, in total, for all work of any subcontractors. All subcontractors, if any, must be listed in the proposal. The State reserves the right to approve all subcontractors. The Contractor shall be responsible to the State for the acts and omissions of all subcontractors or agents and of persons directly or indirectly employed by such subcontractors, and for the acts and omissions of persons employed directly by the Contractor. Further, nothing contained within this document or any contract documents created as a result of any contract awards derived from this RFP shall create any contractual relationships between any subcontractor and the State.

## **7.6 GENERAL INSURANCE REQUIREMENTS**

**7.6.1 General Requirements.** The Contractor shall maintain for the duration of the contract, at its cost and expense, insurance against claims for injuries to persons or damages to property, including contractual liability, which may arise from or in connection with the performance of the work by the Contractor, agents, employees, representatives, assigns, or subcontractors. This insurance shall cover such claims as may be caused by any negligent act or omission.

**7.6.2 Primary Insurance.** The Contractor's insurance coverage shall be primary insurance as respect to the State, its officers, officials, employees, and volunteers and shall apply separately to each project or location. Any insurance or self-insurance maintained by the State, its officers, officials, employees or volunteers shall be excess of the Contractor's insurance and shall not contribute with it.

**7.6.3 Specific Requirements for Commercial General Liability.** The Contractor shall purchase and maintain occurrence coverage with combined single limits for bodily injury, personal injury, and property damage of \$500,000 per occurrence and \$1,000,000 aggregate per year to cover such claims as may be caused by any act, omission, or negligence of the Contractor or its officers, agents, representatives, assigns or subcontractors.

**7.6.4 Additional Insured Status.** The State, its officers, officials, employees, and volunteers are to be covered as additional insureds; for liability arising out of activities performed by or on behalf of the Contractor, including the insured's general supervision of the Contractor; products and completed operations; premises owned, leased, occupied, or used.

**7.6.5 Deductibles and Self-Insured Retentions.** Any deductible or self-insured retention must be declared to and approved by the state agency. At the request of the agency either: (1) the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects the State, its officers, employees, and volunteers; or (2) at the expense of the Contractor, the Contractor shall procure a bond guaranteeing payment of losses and related investigations, claims administration, and defense expenses.

**7.6.6 Certificates of Insurance/Endorsements.** Insurance must be placed with an insurer with a Best's rating of no less than A-. The certificate must also include the State's solicitation number. This insurance must be maintained for the duration of the contract. The State Procurement Bureau, P.O. Box 200135, Helena, MT 59620-0135, must receive all required certificates and endorsements within 10 days from the date of the Request for Documents notice before a contract or purchase order will be issued. Work may not commence until a contract or purchase order is in place. The Contractor must notify the State immediately, of any material change in insurance coverage, such as changes in limits, coverage, change in status of policy, etc. The State reserves the right to require complete copies of insurance policies at all times.

## **7.7 COMPLIANCE WITH WORKERS' COMPENSATION ACT**

The Contractor is required to supply the State Procurement Bureau with proof of compliance with the Montana Workers' Compensation Act while performing work for the State of Montana. (Mont. Code Ann. §§ 39-71-120,

39-71-401, and 39-71-405.) Neither the Contractor nor its employees are employees of the State. The proof of insurance/exemption must be received by the Fish Wildlife and Parks, Purchasing Unit, P.O. Box 200701, Helena, MT 59620-0701, within 10 working days of the Request for Documents Notice and must be kept current for the entire term of the contract.

CONTRACTS WILL NOT BE ISSUED TO VENDORS WHO FAIL TO PROVIDE THE REQUIRED DOCUMENTATION WITHIN THE ALLOTTED TIME FRAME.

Coverage may be provided through a private carrier or through the State Compensation Insurance Fund (406) 444-6500. An independent contractor's exemption can be requested through the Department of Labor and Industry, Employment Relations Division (406) 444-1446. Corporate officers must provide documentation of their exempt status.

## **7.8 COMPLIANCE WITH LAWS**

The Contractor must, in performance of work under this contract, fully comply with all applicable federal, state, or local laws, rules and regulations, including the Montana Human Rights Act, the Civil Rights Act of 1964, the Age Discrimination Act of 1975, the Americans with Disabilities Act of 1990, and Section 504 of the Rehabilitation Act of 1973. Any subletting or subcontracting by the Contractor subjects subcontractors to the same provision. In accordance with section 49-3-207, MCA, the Contractor agrees that the hiring of persons to perform the contract will be made on the basis of merit and qualifications and there will be no discrimination based upon race, color, religion, creed, political ideas, sex, age, marital status, physical or mental disability, or national origin by the persons performing the contract.

## **7.9 INTELLECTUAL PROPERTY**

All patents and other legal rights in or to inventions created in whole or in part under the contract must be available to the State for royalty-free and nonexclusive licensing. Both parties shall have a royalty-free, nonexclusive, and irrevocable right to reproduce, publish or otherwise use and authorize others to use, copyrightable property created under the contract.

## **7.10 CONTRACT TERMINATION**

**7.10.1** The State may, by written notice to the Contractor, terminate this contract in whole or in part at any time the Contractor fails to perform this contract.

**7.10.2** The State, at its sole discretion, may terminate or reduce the scope of this contract if available funding is reduced for any reason. (See Mont. Code Ann. § 18-4-313(3).)

## **7.11 CONTRACTOR PERFORMANCE ASSESSMENTS**

The State may do assessments of the Contractor's performance. This contract may be cancelled for one or more poor performance assessments. Contractors will have the opportunity to respond to poor performance assessments. The State will make any final decision to cancel this contract based on the assessment and any related information, the Contractor's response and the severity of any negative performance assessment. The Contractor will be notified with a justification of contract cancellation. Performance assessments may be considered in future solicitations.

## APPENDIX A: STANDARD TERMS AND CONDITIONS

**By submitting a response to this invitation for bid, request for proposal, limited solicitation, or acceptance of a contract, the vendor agrees to acceptance of the following Standard Terms and Conditions and any other provisions that are specific to this solicitation or contract.**

**ACCEPTANCE/REJECTION OF BIDS, PROPOSALS, OR LIMITED SOLICITATION RESPONSES:** The State reserves the right to accept or reject any or all bids, proposals, or limited solicitation responses, wholly or in part, and to make awards in any manner deemed in the best interest of the State. Bids, proposals, and limited solicitation responses will be firm for 30 days, unless stated otherwise in the text of the invitation for bid, request for proposal, or limited solicitation.

**ACCESS AND RETENTION OF RECORDS:** The contractor agrees to provide the department, Legislative Auditor, or their authorized agents, access to any records necessary to determine contract compliance (Mont. Code Ann. § 18-1-118). The contractor agrees to create and retain records supporting the services rendered or supplies delivered for a period of three years after either the completion date of the contract or the conclusion of any claim, litigation, or exception relating to the contract taken by the State of Montana or third party.

**ALTERATION OF SOLICITATION DOCUMENT:** In the event of inconsistencies or contradictions between language contained in the State's solicitation document and a vendor's response, the language contained in the State's original solicitation document will prevail. Intentional manipulation and/or alteration of solicitation document language will result in the vendor's disqualification and possible debarment.

**ASSIGNMENT, TRANSFER AND SUBCONTRACTING:** The contractor shall not assign, transfer or subcontract any portion of the contract without the express written consent of the department. (Mont. Code Ann. § 18-4-141.)

**AUTHORITY:** The following bid, request for proposal, limited solicitation, or contract is issued under authority of Title 18, Montana Code Annotated, and the Administrative Rules of Montana, Title 2, chapter 5.

**COMPLIANCE WITH LAWS:** The contractor must, in performance of work under the contract, fully comply with all applicable federal, state, or local laws, rules and regulations, including the Montana Human Rights Act, the Civil Rights Act of 1964, the Age Discrimination Act of 1975, the Americans with Disabilities Act of 1990, and Section 504 of the Rehabilitation Act of 1973. Any subletting or subcontracting by the contractor subjects subcontractors to the same provision. In accordance with section 49-3-207, MCA, the contractor agrees that the hiring of persons to perform the contract will be made on the basis of merit and qualifications and there will be no discrimination based upon race, color, religion, creed, political ideas, sex, age, marital status, physical or mental disability, or national origin by the persons performing the contract.

**CONFORMANCE WITH CONTRACT:** No alteration of the terms, conditions, delivery, price, quality, quantities, or specifications of the contract shall be granted without prior written consent of the State Procurement Bureau. Supplies delivered which do not conform to the contract terms, conditions, and specifications may be rejected and returned at the contractor's expense.

**DEBARMENT:** The contractor certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction (contract) by any governmental department or agency. If the contractor cannot certify this statement, attach a written explanation for review by the State.

**DISABILITY ACCOMMODATIONS:** The State of Montana does not discriminate on the basis of disability in admission to, access to, or operations of its programs, services, or activities. Individuals, who need aids, alternative document formats, or services for effective communications or other disability-related

accommodations in the programs and services offered, are invited to make their needs and preferences known to this office. Interested parties should provide as much advance notice as possible.

**FACSIMILE RESPONSES:** Facsimile responses will be accepted for invitations for bids, small purchases or limited solicitations ONLY if they are completely received by the State Procurement Bureau prior to the time set for receipt. Bids, or portions thereof, received after the due time will not be considered. Facsimile responses to requests for proposals are ONLY accepted on an exception basis with prior approval of the procurement officer.

**FAILURE TO HONOR BID/PROPOSAL:** If a bidder/offeror to whom a contract is awarded refuses to accept the award (PO/contract) or, fails to deliver in accordance with the contract terms and conditions, the department may, in its discretion, suspend the bidder/offeror for a period of time from entering into any contracts with the State of Montana.

**HOLD HARMLESS/INDEMNIFICATION:** The contractor agrees to protect, defend, and save the State, its elected and appointed officials, agents, and employees, while acting within the scope of their duties as such, harmless from and against all claims, demands, causes of action of any kind or character, including the cost of defense thereof, arising in favor of the contractor's employees or third parties on account of bodily or personal injuries, death, or damage to property arising out of services performed or omissions of services or in any way resulting from the acts or omissions of the contractor and/or its agents, employees, representatives, assigns, subcontractors, except the sole negligence of the State, under this agreement.

**LATE BIDS AND PROPOSALS:** Regardless of cause, late bids and proposals will not be accepted and will automatically be disqualified from further consideration. It shall be solely the vendor's risk to assure delivery at the designated office by the designated time. Late bids and proposals will not be opened and may be returned to the vendor at the expense of the vendor or destroyed if requested.

**PAYMENT TERM:** All payment terms will be computed from the date of delivery of supplies or services OR receipt of a properly executed invoice, whichever is later. Unless otherwise noted in the solicitation document, the State is allowed 30 days to pay such invoices. All contractors may be required to provide banking information at the time of contract execution in order to facilitate State electronic funds transfer payments.

**RECIPROCAL PREFERENCE:** The State of Montana applies a reciprocal preference against a vendor submitting a bid from a state or country that grants a residency preference to its resident businesses. A reciprocal preference is only applied to an invitation for bid for supplies or an invitation for bid for nonconstruction services for public works as defined in section 18-2-401(9), MCA, and then only if federal funds are not involved. For a list of states that grant resident preference, see <http://www.discoveringmontana.com/doa/gsd/css/Resources/ReciprocalPreference.asp>.

**REFERENCE TO CONTRACT:** The contract or purchase order number MUST appear on all invoices, packing lists, packages and correspondence pertaining to the contract.

**REGISTRATION WITH THE SECRETARY OF STATE:** Any business intending to transact business in Montana must register with the Secretary of State. Businesses that are incorporated in another state or country, but which are conducting activity in Montana, must determine whether they are transacting business in Montana in accordance with sections 35-1-1026 and 35-8-1001, MCA. Such businesses may want to obtain the guidance of their attorney or accountant to determine whether their activity is considered transacting business.

If businesses determine that they are transacting business in Montana, they must register with the Secretary of State and obtain a certificate of authority to demonstrate that they are in good standing in Montana. To obtain registration materials, call the Office of the Secretary of State at (406) 444-3665, or visit their website at <http://www.sos.state.mt.us>.



**SEPARABILITY CLAUSE:** A declaration by any court, or any other binding legal source, that any provision of the contract is illegal and void shall not affect the legality and enforceability of any other provision of the contract, unless the provisions are mutually dependent.

**SHIPPING:** Supplies shall be shipped prepaid, F.O.B. Destination, unless the contract specifies otherwise.

**SOLICITATION DOCUMENT EXAMINATION:** Vendors shall promptly notify the State of any ambiguity, inconsistency, or error, which they may discover upon examination of a solicitation document.

**TAX EXEMPTION:** The State of Montana is exempt from Federal Excise Taxes (#81-0302402).

**TECHNOLOGY ACCESS FOR BLIND OR VISUALLY IMPAIRED:** Contractor acknowledges that no state funds may be expended for the purchase of information technology equipment and software for use by employees, program participants, or members of the public unless it provides blind or visually impaired individuals with access, including interactive use of the equipment and services, that is equivalent to that provided to individuals who are not blind or visually impaired. (Mont. Code Ann. § 18-5-603.) Contact the State Procurement Bureau at (406) 444-2575 for more information concerning nonvisual access standards.

**TERMINATION OF CONTRACT:** Unless otherwise stated, the State may, by written notice to the contractor, terminate the contract in whole or in part at any time the contractor fails to perform the contract.

**UNAVAILABILITY OF FUNDING:** The contracting agency, at its sole discretion, may terminate or reduce the scope of the contract if available funding is reduced for any reason. (Mont. Code Ann. § 18-4-313 (3).)

**U.S. FUNDS:** All prices and payments must be in U.S. dollars.

**VENUE:** This solicitation is governed by the laws of Montana. The parties agree that any litigation concerning this bid, request for proposal, limited solicitation, or subsequent contract, must be brought in the First Judicial District in and for the County of Lewis and Clark, State of Montana, and each party shall pay its own costs and attorney fees. (Mont. Code Ann. § 18-1-401.)

**WARRANTIES:** The contractor warrants that items offered will conform to the specifications requested, to be fit and sufficient for the purpose manufactured, of good material and workmanship and free from defect. Items offered must be new and unused and of the latest model or manufacture, unless otherwise specified by the State. They shall be equal in quality and performance to those indicated herein. Descriptions used herein are specified solely for the purpose of indicating standards of quality, performance and/or use desired. Exceptions will be rejected.

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Revised 3/03

## **APPENDIX B: STANDARD CONTRACT**

1. Parties
2. Effective Date, Duration and Renewal
3. Price Adjustments
4. Services and/or Supplies
5. Consideration/Payment
6. Access and Retention of Records
7. Assignment, Transfer and Subcontracting
8. Hold Harmless/Indemnification
9. Required Insurance
10. Compliance with Workers' Compensation Act
11. Compliance with Laws
12. Intellectual Property
13. Contract Performance Security
14. Contract Termination
15. Liaison and Service of Notices
16. Meetings
17. Contractor Performance Assessments
18. Choice of Law and Venue
19. Scope, Amendment and Interpretation
20. Execution

## PROFESSIONAL MARKETING SERVICES FOR MONTANA STATE PARKS

### 1. PARTIES

THIS CONTRACT, is entered into by and between the State of Montana Fish Wildlife and Parks, Parks Division, (hereinafter referred to as "the State"), whose address and phone number are P O Box 200701, Helena MT 59620, 406-444-3818 and (insert name of contractor), (hereinafter referred to as the "Contractor"), whose nine digit Federal ID Number, address and phone number are (insert federal id number), (insert address) and (insert phone number).

### THE PARTIES AGREE AS FOLLOWS:

### 2. EFFECTIVE DATE, DURATION, AND RENEWAL

**2.1** This contract shall take effect on (insert date), 200(  ), and terminate on (insert date), 200(  ), unless terminated earlier in accordance with the terms of this contract. (Mont. Code Ann. § 18-4-313.)

**2.2** This contract may, upon mutual agreement between the parties and according to the terms of the existing contract, be renewed in one-year intervals, or any interval that is advantageous to the State, for a period not to exceed a total of four years. This renewal is dependent upon legislative appropriations and in no case may this contract run longer than a four-year period.

### 3. PRICE ADJUSTMENTS

Price increases may be permitted at the time of contract renewal through a process of negotiation with the Contractor and the State. Any price increases must be based on demonstrated industry-wide or regional increases in the Contractor's costs. Publications such as the Federal Bureau of Labor Statistics and the Consumer Price Index (CPI) for all Urban Consumers may be used to determine the increased value.

### 4. SERVICES AND/OR SUPPLIES

Contractor agrees to provide to the State the following marketing services:

Develop a brand architecture system that is in alignment with the mission, vision, values and personality of the Parks Division. At the direction of the State and in conjunction with the objectives of the Parks Outreach and Partnership plan, analyze and recommend specific strategies to execute the branding in all the marketing and public relations efforts and touch points of the Division. Assist the State in developing strategies to uniquely position the parks in the minds of the consumer that includes: identification of target markets; specific strategies that include measurable objectives for each target market; and tactics to achieve these objectives. Awareness and integration of components from the Montana State Parks Outreach and Partnership Plan is expected. Assist the State in developing an integrated marketing program including but not limited to advertising, cooperative marketing, internet marketing, public relations, sponsorships and direct marketing including creation, preparation, and placement of advertising in various media. With assistance from the State, develop an annual program in which potential marketing and advertising partners are identified and strategies specified for generating new partnership funds or leveraging the State's funds to extend Park's marketing reach and frequency. Propose marketing and public relations strategies to expand promotional efforts effectively into new target markets within Montana. Provide public relations/publicity support in the execution of those strategies.

### 5. CONSIDERATION/PAYMENT

**5.1** In consideration for the Marketing Services to be provided, the State shall pay according to the following schedule: (insert pay schedule).

**5.2** The State may withhold payments to the Contractor if the Contractor has not performed in accordance with this contract. Such withholding cannot be greater than the additional costs to the State caused by the lack of performance.

**5.3** Contractor may be required to provide banking information at the time of contract execution in order to facilitate State electronic fund transfer payments.

## **6. ACCESS AND RETENTION OF RECORDS**

**6.1** The Contractor agrees to provide the State, Legislative Auditor or their authorized agents access to any records necessary to determine contract compliance. (Mont. Code Ann. § 18-1-118.)

**6.2** The Contractor agrees to create and retain records supporting the **marketing services rendered** for a period of three years after either the completion date of this contract or the conclusion of any claim, litigation or exception relating to this contract taken by the State of Montana or a third party.

## **7. ASSIGNMENT, TRANSFER AND SUBCONTRACTING**

The Contractor shall not assign, transfer or subcontract any portion of this contract without the express written consent of the State. (Mont. Code Ann. § 18-4-141.) The Contractor shall be responsible to the State for the acts and omissions of all subcontractors or agents and of persons directly or indirectly employed by such subcontractors, and for the acts and omissions of persons employed directly by the Contractor. No contractual relationships exist between any subcontractor and the State.

## **8. HOLD HARMLESS/INDEMNIFICATION**

The Contractor agrees to protect, defend, and save the State, its elected and appointed officials, agents, and employees, while acting within the scope of their duties as such, harmless from and against all claims, demands, causes of action of any kind or character, including the cost of defense thereof, arising in favor of the Contractor's employees or third parties on account of bodily or personal injuries, death, or damage to property arising out of services performed or omissions of services or in any way resulting from the acts or omissions of the Contractor and/or its agents, employees, representatives, assigns, subcontractors, except the sole negligence of the State, under this agreement.

## **9. REQUIRED INSURANCE**

**9.1 General Requirements:** The Contractor shall maintain for the duration of the contract, at its cost and expense, insurance against claims for injuries to persons or damages to property, including contractual liability, which may arise from or in connection with the performance of the work by the Contractor, agents, employees, representatives, assigns, or subcontractors. This insurance shall cover such claims as may be caused by any negligent act or omission.

**9.2 Primary Insurance:** The Contractor's insurance coverage shall be primary insurance as respect to the State, its officers, officials, employees, and volunteers and shall apply separately to each project or location. Any insurance or self-insurance maintained by the State, its officers, officials, employees or volunteers shall be excess of the Contractor's insurance and shall not contribute with it.

**9.3 Specific Requirements for Commercial General Liability:** The Contractor shall purchase and maintain occurrence coverage with combined single limits for bodily injury, personal injury, and property damage of \$500,000 per occurrence and \$1,000,000 aggregate per year to cover such claims as may be caused by any act, omission, or negligence of the Contractor or its officers, agents, representatives, assigns or subcontractors.

**9.4 Additional Insured Status:** The State, its officers, officials, employees, and volunteers are to be covered as additional insureds; for liability arising out of activities performed by or on behalf of the Contractor, including the insured's general supervision of the Contractor; products and completed operations; premises owned, leased, occupied, or used.

**9.5 Deductibles and Self-Insured Retentions:** Any deductible or self-insured retention must be declared to and approved by the state agency. At the request of the agency either: (1) the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects the State, its officers, officials, employees, or volunteers; or (2) at the expense of the Contractor, the Contractor shall procure a bond guaranteeing payment of losses and related investigations, claims administration, and defense expenses.

**9.6 Certificate of Insurance/Endorsements:** A certificate of insurance from an insurer with a Best's rating of no less than A- indicating compliance with the required coverages, has been received by the State Procurement Bureau, P.O. Box 200135, Helena, MT 59620-0135. The Contractor must notify the State immediately, of any material change in insurance coverage, such as changes in limits, coverages, change in status of policy, etc. The State reserves the right to require complete copies of insurance policies at all times.

## **10. COMPLIANCE WITH THE WORKERS' COMPENSATION ACT**

Contractors are required to comply with the provisions of the Montana Workers' Compensation Act while performing work for the State of Montana in accordance with sections 39-71-120, 39-71-401, and 39-71-405, MCA. Proof of compliance must be in the form of workers' compensation insurance, an independent contractor's exemption, or documentation of corporate officer status. Neither the contractor nor its employees are employees of the State. This insurance/exemption must be valid for the entire term of the contract. A renewal document must be sent to the State Procurement Bureau, P.O. Box 200135, Helena, MT 59620-0135, upon expiration.

## **11. COMPLIANCE WITH LAWS**

The Contractor must, in performance of work under this contract, fully comply with all applicable federal, state, or local laws, rules and regulations, including the Montana Human Rights Act, the Civil Rights Act of 1964, the Age Discrimination Act of 1975, the Americans with Disabilities Act of 1990, and Section 504 of the Rehabilitation Act of 1973. Any subletting or subcontracting by the Contractor subjects subcontractors to the same provision. In accordance with section 49-3-207, MCA, the Contractor agrees that the hiring of persons to perform the contract will be made on the basis of merit and qualifications and there will be no discrimination based upon race, color, religion, creed, political ideas, sex, age, marital status, physical or mental disability, or national origin by the persons performing the contract.

## **12. INTELLECTUAL PROPERTY**

All patent and other legal rights in or to inventions created in whole or in part under this contract must be available to the State for royalty-free and nonexclusive licensing. Both parties shall have a royalty-free, nonexclusive, and irrevocable right to reproduce, publish or otherwise use and authorize others to use, copyrightable property created under this contract.

## **13. CONTRACT TERMINATION**

**13.1** The State may, by written notice to the Contractor, terminate this contract in whole or in part at any time the Contractor fails to perform this contract.

**13.2** The State, at its sole discretion, may terminate or reduce the scope of this contract if available funding is reduced for any reason. (See Mont. Code Ann. § 18-4-313(3).)

## **14. LIAISON AND SERVICE OF NOTICES**

All project management and coordination on behalf of the State shall be through a single point of contact designated as the State's liaison. Contractor shall designate a liaison that will provide the single point of contact for management and coordination of Contractor's work. All work performed pursuant to this contract shall be coordinated between the State's liaison and the Contractor's liaison.

Linda Howard will be the liaison for the State.  
      P O Box 200701       (Address)  
      Helena MT 59620       (City, State, ZIP)  
      406-444-3818       (Telephone #)  
      409-444-4952       (Fax #)  
      LHoward @mt.gov       (E-mail)

                                   will be the liaison for the Contractor.  
                                   (Address)  
                                   (City, State, ZIP)  
                                   (Telephone #)  
                                   (Fax #)  
                                   (E-mail)

The State's liaison and Contractor's liaison may be changed by written notice to the other party. Written notices, requests, or complaints will first be directed to the liaison.

15. **MEETINGS**

The Contractor is required to meet with the State's personnel, or designated representatives, to resolve technical or contractual problems that may occur during the term of the contract, at no additional cost to the State. Meetings will occur as problems arise and will be coordinated by the State. The Contractor will be given a minimum of three full working days notice of meeting date, time, and location. Face-to-face meetings are desired. However, at the Contractor's option and expense, a conference call meeting may be substituted. Consistent failure to participate in problem resolution meetings two consecutive missed or rescheduled meetings, or to make a good faith effort to resolve problems, may result in termination of the contract.

16. **CONTRACTOR PERFORMANCE ASSESSMENTS**

The State may do assessments of the Contractor's performance. This contract may be cancelled for one or more poor performance assessments. Contractors will have the opportunity to respond to poor performance assessments. The State will make any final decision to cancel this contract based on the assessment and any related information, the Contractor's response and the severity of any negative performance assessment. The Contractor will be notified with a justification of contract cancellation. Performance assessments may be considered in future solicitations.

17. **CHOICE OF LAW AND VENUE**

This contract is governed by the laws of Montana. The parties agree that any litigation concerning this bid, proposal or subsequent contract must be brought in the First Judicial District in and for the County of Lewis and Clark, State of Montana and each party shall pay its own costs and attorney fees. (See Mont. Code Ann. § 18-1-401.)

18. **SCOPE, AMENDMENT AND INTERPRETATION**

18.1 This contract consists of **(insert number)** numbered pages, any Attachments as required, RFP #03-560J as amended and the Contractor's RFP response as amended. In the case of dispute or ambiguity

about the minimum levels of performance by the Contractor the order of precedence of document interpretation is in the same order.

**18.2** These documents contain the entire agreement of the parties. Any enlargement, alteration or modification requires a written amendment signed by both parties.

**19. EXECUTION**

The parties through their authorized agents have executed this contract on the dates set out below.

**Fish Wildlife and Parks**

**Jeff Hagener, Director**

**P O Box 200701**

Helena MT 59620

**(INSERT CONTRACTOR'S NAME)**

**(Insert Address)**

**(Insert City, State, Zip)**

FEDERAL ID # **(Insert Number)**

BY: \_\_\_\_\_  
(Name/Title)

BY: \_\_\_\_\_  
(Name/Title)

BY: \_\_\_\_\_  
(Signature)

BY: \_\_\_\_\_  
(Signature)

DATE: \_\_\_\_\_

DATE: \_\_\_\_\_

Approved as to Legal Content:

Approved as to Form:

\_\_\_\_\_  
Legal Counsel (Date)  
Agency: \_\_\_\_\_

\_\_\_\_\_  
Procurement Officer (Date)  
Agency: \_\_\_\_\_



# **Outreach and Partnership Plan for Montana State Parks**

**October 2005  
Visitor Services Bureau  
lhoward@mt.gov**



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## **I. Executive Summary**

This plan outlines steps to strengthen the connections between state parks, park users, businesses, and communities. Montana State Parks needs to convey the parks' value and benefits so that the public becomes increasingly connected to these places and so that support grows for their continued preservation. To this end, the plan has established the following goals:

- 1) Build identity and increase awareness of state parks and the recreation grants programs
- 2) Strengthen and enhance customer service
- 3) Balance the quality and type of visitor experiences with long-term visitor impact on the natural and cultural resources
- 4) Develop strategies to direct visitors to underused parks and to increase park visitation at off-peak times
- 5) Develop strategic partnerships with organizations and communities
- 6) Increase the flow of information and educational stories to targeted audiences
- 7) Obtain data from park users and non-users to identify opportunities for service and facility improvements and targeted marketing.

These goals derive from recommendations developed by the nine-member State Parks Futures II Committee. Governor Judy Martz appointed that committee in October 2001 to review the operations, structure, and management of state parks and make specific recommendations for improvement of the state park system. The committee developed its report, titled "Report and Recommendations for the Montana State Park System," with a great deal of public input, and the process included a three-month comment period, July 2002 through September 2002.

"Report and Recommendations for the Montana State Park System" contained four items related to marketing, communication and partnership development. Among its other recommendations (included in the appendix) was the formation of a marketing plan. Hence this document.

In addition, this plan takes its lead from "2020 Vision for Montana State Parks," the long range plan developed in 1998. The Parks Division created that document in a process that also included extensive public input. The "Fish, Wildlife and Parks Strategic Plan" (November 2004) also provides a foundation for this plan. Together, these planning documents have established the direction for the state parks system as further described in "Section II. Mission and Vision." The plan is an extension of these plans, outlining the specific steps necessary to accomplish the marketing, communications and partnership components recommended in these earlier reports.

Development of this plan began in October 2004. The Parks Division held a series of public meetings in October and November to gather input. The public comment period for the draft plan ran from July 18, 2005, to August 19, 2005. Parks received written comments, ranging from full support of the plan to scrapping the plan

altogether. Parks carefully considered all comments and this final plan reflects changes made in response to the input the Parks Division received on earlier drafts.

The word “marketing” is often perceived as advertising or selling, however these are only two elements of the complex marketing process. Marketing involves examining the particular wants and needs of the people that use one’s services, then developing ways to satisfy those desires while maintaining the integrity and mission of the organization.

Based on market research and analysis, strategic decisions can be made to implement improvements to the State Parks system on many levels and not simply to increase visitation.

## **II. Mission and Vision**

The mission of Montana State Parks is three-fold:

- Conserve a representative diversity of the state’s natural, cultural and recreational amenities;
- Provide resource education and interpretation; and
- Help facilitate sustainable economic development through tourism.

The “Report and Recommendations for the Montana State Park System,” the “2020 Vision for Montana State Parks” and the “Fish, Wildlife & Parks Six-Year Plan” have further defined the direction and vision for state parks. Through each of these planning processes emerged five common desirable outcomes:

- 1) A parks program where natural, historical/cultural, and recreational resources are enhanced and protected in perpetuity.
- 2) A parks program where visitor expectations are met or exceeded due to the quality of the natural and historical/cultural resources, recreational opportunities, facilities, programs, and staff.
- 3) A parks program that provides outstanding education and interpretation of Montana’s natural, historical, cultural, and recreational resources and the conservation issues that face them.
- 4) A parks program that contributes to Montana’s growing tourism industry and general economic stability in a manner that is sustainable for the system’s key resources.
- 5) A recreational grants program that adds to Montanans’ quality of life by providing funds for outdoor recreational facilities, infrastructure, and improvements.

This plan recognizes these desired outcomes and outlines strategies to market the parks in ways consistent with this vision.

### **III. Situational Analysis**

To accomplish the goals of this plan requires an understanding of current use, travel trends, and an analysis of the parks' strengths, weaknesses, opportunities, and threats. It also requires an understanding of the services currently offered by the parks and the parks' historic marketing effort. This section summarizes that material.

The data presented indicates that healthy market segments exist to support Montana State Parks. It also suggests those areas of opportunities where parks could improve services. Both will be addressed in Section IV of this document.

#### **A. Market Summary**

##### **1. Market Demographics**

The 2004 Montana State Parks Visitation Report indicates that Montana State Parks served 1.65 million visitors in 2004, the highest number since 1995.<sup>1</sup> Elimination of resident day use fees in 2004 partly explains this increase.

Montana residents visit the parks far more frequently than tourists. Visitation statistics show that in 2004 Montanans comprised 73% of park visitors. Residents comprise 85% of the visitors to water-based sites while visitors to cultural and historic sites are split at around 57% residents and 43% non-residents.<sup>2</sup>

Day users comprise 86% of the visitors to state parks.<sup>3</sup>

Campers and day-trippers use parks with campgrounds at varying rates, depending on the park. Campground occupancy rates vary widely. During peak season, some campgrounds, such as Tongue River Reservoir and Flathead Lake sites, are frequently at or near capacity. Others, like Lewis and Clark Caverns and Makoshika, typically have sites available.

#### **Statewide Trends Affecting Visitation**

Overall, Montana's population is increasing; however, it is not increasing equally across the state. The greatest population expansion is in the west, from Bozeman north through the Flathead Valley. For example, from 1990 to 2000 Flathead County's population grew at 25.8%. In contrast, twenty-two counties in eastern Montana lost population in the last decade while the central portion of the state remained stagnant or experienced growth of 6% or less.<sup>4</sup>

While in-migration accounts for some of this trend, the overall population increase represents people moving to Montana from other states, providing a whole new set of people ready to learn about Montana heritage, state parks, and recreational opportunities.

The changing face of Montana also impacts the way people use the resources, and this poses unique challenges for resource managers. In the western part of the state, with its growing population, there are overuse issues and growing social conflicts among different types of users. Shrinking public recreation

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<sup>1</sup> 2004 State Parks Visitation Report.

<sup>2</sup> Ibid.

<sup>3</sup> Ibid.

<sup>4</sup> U.S. Census 2000, [www.census.gov/main/www/cen2000.html](http://www.census.gov/main/www/cen2000.html)

access, resulting from real estate development, makes parks and other public land even more desirable by all user groups.

## **2. National Travel Trends<sup>5</sup>**

Rather than long vacations, Americans are taking multiple mini-vacations each year. These are generally 3 to 4 days in length. This means travelers want to pack more activities into a shorter period.

Today's visitors want immersive experiences that allow them to "do it, see it, and ask about it."<sup>6</sup> Travelers increasingly value interpretive programming and signs, special events, and amenities that help them engage in activities (e.g., boat and bicycle rentals, warming huts for ice skating, trail systems).

Americans are placing an increased emphasis on family and are seeking vacation destinations with activities designed and packaged for kids. Tourism studies show that children influence more than half of all family travel decisions made by their parents. In consequence, it has become increasingly important to develop better experiences for children and produce more communications directed toward them.

"Togetherness" is a new trend in the tourism industry. Groups composed of multiple families or couples are vacationing collectively. This travel segment is looking for reserve-able group facilities, vacation packages, and value-added activities.

Empty nesters are another growing market. Empty nesters frequently travel during off-peak times and characteristically desire comfort (e.g., RV hookups and flush toilets) and educational opportunities.

The "soft adventure market" is one of today's fastest-growing travel demographics. This market now includes 92 million Americans who enjoy RV and tent camping, boating, wildlife viewing, fishing, and other outdoor family fun.

Festivals and fairs have become increasingly popular ways for travelers to experience new destinations and cultures. Four in ten (41%) U.S. adult travelers attended a festival and/or fair during a trip in 2002.

Shopping is the most popular trip activity for U.S. adult travelers, with 63% of adult travelers naming shopping as an activity they engaged in during a trip.

Many of today's travelers also desire experiences tailored to their needs for one-stop vacation shopping. They are attracted to packages that include a theme, a driving tour, special events, places to stay, local color, great food, and shopping for items to commemorate the experience.

## **B. Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis**

To determine how national and statewide travel trends affect visitation levels at state parks, the Visitor Services Bureau conducted SWOT analysis meetings throughout the state with Fish, Wildlife & Parks staff, the tourism industry, and others with a vested interest in state parks. For additional input, staff sent questionnaires to seasonal parks employees and analyzed over 5,000 comment cards returned by visitors in 2004. Several key themes emerged from these sources; most significantly, lack of identity and

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<sup>5</sup> Information on national travel trends comes from Travel Industry Association, Domestic Travel Market Report, 2004 and 2003 editions, [www.tia.org/Travel/traveltrends.asp](http://www.tia.org/Travel/traveltrends.asp)

<sup>6</sup> Travel Industry Association, Domestic Travel Market Report, 2004 Edition, [www.tia.org/Travel/traveltrends.asp](http://www.tia.org/Travel/traveltrends.asp)

awareness surfaced as the major issue for both state parks and the recreation grant programs. A more detailed analysis of the results is presented in the chart below.

<p style="text-align: center;"><b>Strengths</b></p> <ul style="list-style-type: none"> <li>•Parks has friendly, knowledgeable, and enthusiastic frontline staff. Visitor comment cards rated staff 4.7 on a 1-to-5 scale.</li> <li>•Existing interpretation and educational opportunities greatly add to a positive visitor experience.</li> <li>•The parks are unique and authentic and offer diverse scenic beauty.</li> <li>•The quality and variety of outdoor recreational opportunities are a strength.</li> <li>•Day use areas are a good value and affordable to a wide range of visitors.</li> <li>•Parks with on-site staff presence are perceived as safe places to visit.</li> </ul>	<p style="text-align: center;"><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>•There is a lack of identity and awareness—parks is often confused with other public agencies.</li> <li>•There is a lack of developed facilities such as campsite hook ups, showers, and food concessions.</li> <li>•There is a shortage of directional and interpretive signage.</li> <li>•Parks lack group sites.</li> <li>•There is a shortage of interpretative staff.</li> <li>•There is no camping reservations system.</li> <li>•There is a lack of “packaging” with other tourism facilities.</li> <li>•Parks lacks staff for fishing access site maintenance.</li> <li>•Parks’ website is not user friendly.</li> <li>•The diversity of parks often confuses the public about what kind of experience to expect.</li> </ul>
<p style="text-align: center;"><b>Opportunities</b></p> <p>Opportunities exist to:</p> <ul style="list-style-type: none"> <li>•create a clear identity and consistent look and message.</li> <li>•create themed packages with local communities and other attractions.</li> <li>•form strategic partnerships with those who share a common vision.</li> <li>•redesign and enhance the parks web site.</li> <li>•nurture support groups.</li> <li>•attract more group use.</li> <li>•add more interpretive programming and signs.</li> <li>•add amenities and activities to enhance visitor experience.</li> </ul>	<p style="text-align: center;"><b>Threats</b></p> <ul style="list-style-type: none"> <li>•Rising price of gasoline may limit travel.</li> <li>•Competing opportunities, which can be anything from video games to theme parks, keep people from the parks.</li> <li>•Poor weather and natural events, such as fire and drought, reduce use.</li> </ul>

### **C. Services**

The fifty Montana state parks are divided into three types: natural, cultural/historical, and water-based recreation. The facilities and services offered at these sites are diverse. Seven parks have staffed visitor centers and eighteen parks offer camping. Other overnight accommodations include three cabins, three yurts, and five tipis.

Parks' merchandise is currently limited to denim shirts, caps, mugs, pins, three videos, and one book, as well as specific site items in places such as Bannack, Makoshika, Chief Plenty Coups, and Ulm Pishkun. Value-added activities include a variety of guided tours and hikes, field trip opportunities for students, interpretive programs, and limited recreation equipment rental. Concessionaires at Tongue River, Caverns, and Hell Creek offer limited groceries, food items, beverages, souvenirs, and supplies.

Comparing Montana's state parks to those in eighteen other western states shows that Montana parks offer significantly fewer services and value-added activities than those in other western states. Only three other states (Nevada, Wyoming and Alaska) do not offer electrical or sewer hookups at their state park campsites. Only one other state, Nevada, does not have a reservation system for any state park campsites.

Unlike in Montana, most state park systems offer a wide variety of value-added activities such as horseback rides, recreational equipment rentals, food and beverage services, recreational skills instruction, camp stores, horseshoe pits, volleyball courts, cross country ski trails, and more. Some systems offer hostels, golf courses, and full-service lodges. The goal for Montana State Parks is to balance amenities that can enhance the visitor experience with a level of development that current and future visitation levels can support while still protecting the resources.

#### **D. Historical Marketing Efforts**

Historically, Montana State Parks has not approached marketing as a comprehensive program. Past efforts, while well intentioned, have been sporadic and reactive with no dedicated funding or trained staff to develop a program. There is now the opportunity to place a greater emphasis on marketing as part of the overall management system.

In the past, marketing efforts concentrated on passport sales. Resident passport holders were the foundation of a mailing list to which a biennial newsletter was sent. With the change in fee structure, parks has lost the ability to communicate with loyal park users in the traditional manner.

In previous years, the majority of information about state parks has been distributed through a brochure placed on racks within Montana. In addition, individual parks produced and distributed site-specific printed material, planned events, and made media contacts. Although the FWP Conservation Education Division would provide assistance, the responsibility for marketing primarily rested with local parks and regional offices. As a result, there has been no comprehensive approach to design and parks has failed to create a clear, consistent identity. This is changing, with the Conservation Education Division strengthening its commitment to serving the Parks Division and addressing its needs.

A web site maintained by the Fish, Wildlife & Parks Information Technology staff contains detailed information about parks, but does not take advantage of many web technologies that add interest and interactivity to the site. Aside from infrequent inclusion in Travel Montana campaigns, playing a role in the Montana Tourism Recreation Initiative, and participating in the annual Tourism Conference, state parks has remained a relatively low-key player in the tourism industry.

### **IV. Marketing Strategy**

#### **A. Mission**

The mission of the Parks Division marketing effort is threefold:

- to create a strong identity for the state parks system
- to increase awareness of opportunities for Montanans and out-of-state visitors to experience Montana's rich heritage in state parks
- to increase Montana recreational organizations' participation in the grants programs.

## **B. Target Audiences**

An evaluation of the SWOT analysis, visitation reports, ITRR Niche News, and national travel trends has led to the decision to focus communication primarily toward Montana residents. Except for the website presence and out-of-state promotion through information fulfillment, parks will continue to leave most of the job of attracting out-of-state visitors to the Montana Promotion Division (Travel Montana).

Specific target markets within Montana will include:

- K-12 students
- Soft adventure seekers
  - Campers
  - RVers
  - Hikers
  - Boaters
  - Cyclists
  - Wildlife Viewers
- Families
- Empty nesters
- History and native culture enthusiasts
- Communities and organizations interested in recreation development

Outside Montana, the continuing emphasis will be to work with Travel Montana to achieve the best results possible through packaging, publicity, familiarization tours, and other joint marketing efforts.

## **C. Message**

Parks will create a slogan or concise catch phrase that communicates the following:

“Montana's natural, cultural and recreational heritage is experienced in its state parks, where visitors can learn about the state's heritage in a comfortable, welcoming setting.”

## **Guiding Principles:**

The following four principles reflect the vision statement for Montana State Parks. They will guide Parks Division employees in all actions and communications with their publics.

### **Stewardship**

The Parks Division will promote stewardship among staff and visitors. Staff will seek opportunities to teach stewardship principles by demonstrating respect for the "place" and the importance of balancing recreation with the needs of the natural and cultural resources.



### **Service**

Staff will build relationships with the public through a strong public service ethic and friendly, enthusiastic person-to-person connections.

### **Storytelling**

Staff will strengthen visitors' connection to the parks by making them places where Montana's stories are shared.

### **Local Community Focus**

Staff will continually reach out to the people, governments, and organizations of their local communities, strengthening local partnerships and commitment to the parks. In all things, staff will keep in mind that success is built on local relationships, one person at a time.

## **D. Goals and Objectives**

### **Goal 1:**

Build identity and increase awareness of state parks and the recreation grants program

**Objective 1.1:** Create a marketing message that captures the state parks system and positions it positively in the minds of the public.

**Strategy:** Contract an agency to create a graphic identity and slogan for Montana State Parks.

**Strategy:** Participate in tourism, cultural, and recreational conferences.

**Objective 1.2:** Have a presence at meetings and conventions of the Montana Association of Counties and the League of Cities and Towns, as well as at other recreation organization and local government meetings.

**Strategy:** Create a trade show exhibit for the grants and trails program and participate in appropriate gatherings.

**Objective 1.3:** Conduct targeted outreach to organizations and local governments who would most benefit from the recreation grants program.

**Strategy:** Develop a distribution plan for the grants brochure.

**Objective 1.4:** Sponsor a significant statewide recreational event or activity annually to gain awareness for state parks and to generate strong public support, involvement, and commitment to the state parks system as a whole.

**Strategy:** Create a series of cultural arts festivals to take place at several parks around the state. Find a corporate or community sponsor for these events, which could occur during a time period designated as "State Parks Month."

**Objective 1.5:** Participate in grand opening ceremonies upon the completion of grant projects and issue media releases that define FWP's role in the project.

**Strategy:** Coordinate attendance at functions with Parks Division staff and work with Regional Information Officers to issue press releases at application time and on the completion of projects.

**Goal 2:**

Strengthen and enhance customer service and visitor experiences.

**Objective 2.1:** Set clear performance expectations for all parks staff and provide the training and tools necessary to ensure that employees can successfully and enthusiastically perform their jobs.

**Strategy:** Conduct employee customer service training on an ongoing basis.

**Strategy:** Recognize employees for outstanding performance.

**Strategy:** Increase web presence to recruit volunteers to assist with staffing.

**Objective 2.2:** Identify appropriate sites where there is consumer demand and staffing to handle additional activities. Add at least two value-added services to these sites each year.

**Strategy:** Investigate revenue-generating ideas and possible concessionaires.

**Objective 2.3:** Develop a merchandising program featuring high quality products in several price ranges.

**Strategy:** Research potential merchandise relevant to the parks' mission to sell online and in gift shops. Decisions to add products to the existing line of merchandise will be based upon the market demand and the products' promotional value.

**Goal 3:**

Balance the quality and type of visitor experiences, including day and overnight use, with long-term visitor impact on the natural and cultural resources.

**Objective 3.1:** Protect and preserve the natural features in state parks by creating alternative ways to experience some of the more fragile resources the parks have to offer.

**Strategy:** Provide more parks experiences via interpretive programs, educational trunks, and an interactive web site so that the public can appreciate and learn from the parks without impacting the natural and cultural resources.

**Objective 3.2:** Promote stewardship of Montana's heritage and recreation resources among young people.

**Strategy:** Develop a single statewide, curriculum-based educational program that can be delivered at parks and classrooms across the state and develop a promotional campaign for the program.

**Objective 3.3:** Create a program that rewards visitors when they show exceptional stewardship in state parks and at fishing access sites.

**Strategy:** Establish criteria and a "reward" item such as a pin or patch to honor good stewardship. Create public service announcements to introduce the program to the public.

**Objective 3.4:** Increase awareness and compliance of the non-resident snowmobile and OHV permit law.

**Strategy:** Produce public service announcements, visitor channel spots, posters, and signs to distribute to targeted markets and license vendors.

**Goal 4:**

Develop strategies to direct visitors to underused parks and to increase park visitation at off-peak times.

**Objective 4.1:** Work with park managers to identify parks where increasing off season use is appropriate.

**Strategy:** Examine FTE levels, public use levels and service levels at parks to determine what parks should be promote for off season use.

**Objective 4.2:** Identify ways to promote visitation to all parks at off-peak times.

**Strategy:** Promote mid-week and shoulder season visits by creating special events and interpretive activities and potentially offering pricing incentives.

**Goal 5:**

Develop strategic partnerships with other state agencies, the tourism industry, tourism countries, federal partners, tribal entities, support groups, and companies and organizations that share common goals.

**Objective 5.1:** Build audiences for the interpretative programs offered at Montana State Parks.

**Strategy:** Develop innovative ways to encourage interpretive program participation. Methods may include weekly radio broadcasts, weekly or biweekly newspaper columns, travel channel broadcasts, traveler information broadcast systems, and cooperative community advertising.

**Objective 5.2:** Establish relationships with key community recreation, nature-based, and culture-based organizations in order to engage their members.

**Strategy:** Develop partnerships with groups such as Elderhostel and Girl Scouts to create specific programs and events that will attract 30 to 100 participants. Ensure that these events are set apart from recreational events and contain a high level of educational and interpretive content.

**Objective 5.3:** Create strategic partnerships with companies, organizations, tribal entities, and government agencies whose values and goals can be aligned with the mission of Montana State Parks.

**Strategy:** Develop a list of potential partners for promotional activities and recreation grants, and for each prepare a plan, a presentation, and a desired outcome.

**Objective 5.4:** Establish culturally appropriate Native American events that help communicate the cultural and historical story of Montana.

**Strategy:** Work with the Montana Tribal Tourism Alliance to identify and develop events that share the traditional and contemporary aspects of American Indian culture while protecting the integrity and traditions of those cultures.

**Objective 5.5:** Link with local communities and tourism businesses to create at least two themed packages statewide.

**Strategy:** Solicit suggestions for themed packages from each FWP region (two per region). Identify potential partners and decide who should facilitate the packaging.

**Goal 6:**

Increase the flow of information and educational stories to targeted audiences.

**Objective 6.1:** Increase the role the FWP state parks web page plays in communicating to targeted audiences.

**Strategy:** Redesign the creative content of the web site to showcase an accurate and up-to-date picture of Montana's parks and recreation and grant opportunities.

**Objective 6.2:** Support and promote the themed packages to targeted markets.

**Strategy:** Issue stories about the packages to targeted special interest publications.

**Goal 7:**

Obtain data from parks users and non-users and the parks in order to identify where service and facility improvements and targeted marketing can positively affect campground occupancy rates and user distribution.

**Objective 7.1:** Obtain demographic, psychographic, service preference, and customer satisfaction level information about our current users at selected parks on an annual basis.

**Strategy:** Work with FWP Responsive Management Unit, Institute for Tourism and Recreation Research, and other groups to determine the best methodology for collecting data.

**Objective 7.2:** Obtain demographic, psychographic, and service preference information about non-users of parks to determine barriers affecting visitation.

**Strategy:** Work with FWP Responsive Management Unit, Institute for Tourism and Recreation Research, and other groups to determine the best methodology for collecting data.

**Objective 7.3:** Create an internal system to accurately measure occupancy rates and day use at park campgrounds.

**Strategy:** Have Operations and Management Bureau work with FWP's IT staff to design a reporting system.

## **E. Action Items**

<b>Task</b>	<b>Date to be completed</b>	<b>Goals Addressed</b>	<b>Responsible Party</b>
Hire an agency or contractor to do creative design	Dec. 1, 2005	1	Howard
Develop unified graphic design for signs and brochures	Spring 2006	1	Howard, Soderberg
Printed material designed and distribution plans established	Spring 2006	1	Howard
Exhibit at Montana fairs, travel and recreation shows	Ongoing	1	Howard, Con Ed, Other FWP staff
Hire photographer for park images	2005-2007	1	Howard
Develop digital photo library	2005-2007	1	Tipton, Howard, IT Staff
Create a trade show exhibit	Spring 2006	1	Howard, Timmerman
Participate in MACO, MLCT and other meetings	Ongoing	1	Timmerman
Issue media release for application process	Ongoing	1	Timmerman, Tipton
Participate in grand opening events upon completion of grants projects	Ongoing	1	Timmerman
Issue media release upon completion of grants projects	Ongoing	1	Timmerman, RIOs
Conduct customer service training each spring	Ongoing	2	Howard
Develop and distribute employee newsletter	Summer 2005	2	Howard
Work with managers to increase volunteer participation	Spring 2006	2	Howard, Managers
Identify successful volunteer projects, develop media recognition	Fall 2005	2	Park Managers, Howard, Tipton
Follow up on guest complaints within 5 days	Ongoing	2	Managers, Van Genderen
Develop a group facilities guide to the parks	Winter 2006	1,2	Howard
Research possible sites where value added activities would work. Prepare cost-revenue and feasibility worksheet.	Summer 2006	2	Howard, Alltucker
Decide on implementation of value added services	Summer 2006	2	Managers

Research merchandise options and prepare cost-revenue worksheets.	Winter 2005	2	Howard, Alltucker
Prepare photos and text to be added to online parks store.	Winter 2005	2	Howard, Alltucker
Identify appropriate sites for season extensions	Winter 2006	4	Managers
Establish mid-week visit promotions	Spring 2006	4	Howard
Create one new education trunk each year	Spring 2006	2,3	Soderberg, Interpretive Staff
Grand re-opening for Lone Pine and Makoshika after exhibits are completed		1	Park Managers
Create interactive web pages with interpretive topics	Winter 2005	1,2,3,4	Soderberg, Interpretive Staff
Contract with education specialist to develop program content	Winter 2005	3	Soderberg
Establish stewardship name, criteria and award for recognizing people	Fall 2005	3	Howard, Semler, Committee
Produce PSA's for stewardship program	Fall 2005	3	Tipton, Howard
Introduce program at Parks Division meeting	Dec. 2005	3	Howard, Semler
Develop cooperative project to insert parks on visitor channels at hotels	Summer 2006	1,5	Howard
Develop a radio or TV program that will promote interpretive programs	Spring 2006	1,5	Soderberg
Establish formal relationship with Elderhostel and Scouting program	Winter 2005	1,2,3,5	Soderberg
Create new annual statewide event series	Summer 2006	1,2,3,5	Howard, Managers
Create statewide sponsorship, tied to at least one event per year	By Dec. 2006	5	Howard
Place brochure racks at County Treasurer's offices and fill with park and FAS brochures. Visit on quarterly basis to deliver more material.	Fall 2005	1,2,5	Regional Park Managers

Regional managers join Chambers of Commerce and tourism organizations and attend functions	Ongoing	5	Regional Park Managers
Create two themed packages each year	Summer 2006	1,2,3,5	Howard, Park Managers
Join key writers organizations	2005	1,6	Con Ed
Host a dinner for Society of American Travel	Summer 2005	1,5,6	Howard, Tipton, R-2 staff
Work with Con Ed to develop media kits	Fall 2005	1,6	Howard, Tipton
Produce a minimum of three feature stories each year per region	Ongoing	1,6	Park Managers, RIOs
Work with FWP IT staff to complete web content upgrade	Spring 2006	1,2,3,4,6	Howard, IT staff
Work with RMU, ITRR or others to develop methodology and schedule surveys		1,2,7	Howard

## **F. Budget**

The Parks Division has historically allocated funds to marketing efforts. This plan further focuses those efforts toward strengthening relationships and communicating the importance of division programs and the opportunity for Montanans to participate in them. The recommended budget is \$95,000 in the first year and \$85,000 in the following years.

Contracted Services:	\$25,000 – first year
	\$15,000 – subsequent years
Parks Brochure Printing:	\$20,000
Printed Materials:	\$10,000
Promotional Materials:	\$10,000
Special Event Support:	\$ 5,000
Partnership Support:	\$20,000
Publicity:	\$ 5,000

Infrastructure development and physical amenity improvements are not considered in this budget recommendation. Money for those programs will come from another fund. Funding for interpretive programs and signs, employee training, and merchandising will come from the Visitor Services Bureau budget.

## **G. Review and Revision of the Plan**

The Parks Division will revisit this plan for appropriateness and viability at least every 12 months. This does not mean reinventing it, but it does mean a close inspection of achievements, goals, and challenges that have come up since it was written and adopted. Many things can change and adjustments may need to be made to the focus, direction, prioritization, or even the vision of the parks. An open mind and a clear understanding of the current and forecast conditions will be critical to understanding what, if anything, needs rethinking.

## V. Conclusion

Montana's state parks are gems of unique beauty whose very existence enriches the state, its citizens, and its visitors. As sources of family fun and adventure, they provide opportunities to strengthen family ties. As sources of natural and cultural education, they enhance the public's understanding of the state's heritage and ecology. As points of local interest, they provide reasons for tourists to visit or extend their stays, thus enhancing local economies. Through marketing, the parks can increase Montanans' commitment to preserving these important places. Marketing can help extend the seasons of use, introduce the parks to new users, educate the public about the importance of conservation, and tie the parks more closely to local communities. An effective marketing campaign will promote stewardship, enhance customer service, and increase awareness of the parks' amazing resources. Earlier planning processes have produced a clear vision for the parks' future. An effective marketing campaign is a key component to fulfilling that vision.

## APPENDIX

### **Excerpts from the State Parks Futures II Committee's "Report and Recommendations for the Montana State Park System" related to marketing and communications**

- Recommendation 10: Working with the Montana Promotional Division, and tailored to the mission and vision statements on page 4, Parks Division should develop a consistent, long term marketing plan for the state park system. Marketing may increase use of parks but can also help redistribute use away from overcrowded parks.
- Improve the information available on the values and services provided at individual parks through brochures, web sites and other means.
- Recognize that marketing is key. We need to convey the value of each park, as well as marketing the "package" of the overall system and other public and private attractions in Montana. The specific resources of each park are what draws people to the parks and makes visitors advocates for these resources.
- Although the 1989 Futures Committee I determined that using the single "parks" designation provided a more consistent image for the parks system, Parks Division should better communicate whether individual parks are predominantly cultural/historical, natural or recreational parks.
- Use highway maps, web site, brochures and other means to inform the public about the values and services available at individual parks, and whether the park is a cultural/ historic, natural, or recreational park.
- Recommendation 7: FWP should develop pilot projects to develop thematic links among parks that draw a common interest, such as the Lewis and Clark Trail, river corridors etc., including between neighboring state as appropriate.
- Recommendation 8: Parks Division should acknowledge and foster the existing and potential economic development values of state parks and the value-added opportunities for enriching visitor experiences, while preserving existing values.



- Recommendation 11: Parks are understaffed, and the system is unable to maximize the quality of visitors' experiences, resource and visitor protection, benefits and organizations to share information, expertise and staff as to local communities and collection of fees. To reduce these problems the Parks Division should:
  - a) Seek volunteers and financial sponsors from friends of the park associations, civic groups, businesses, and local communities.
  - b) Encourage commercial and entrepreneurial opportunities to provide some visitor services in appropriate parks.
  - c) Seek resources for paid staff to supervise volunteers based on demonstrated need to conduct interpretive and educational programs, site maintenance, fee collection, site control and visitor protection
  - d) Continue to develop partnerships with other agencies as appropriate.<sup>7</sup>

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<sup>7</sup> Report and Recommendations for the Montana State Park System, Submitted by the State Parks Futures Committee II, November 2002, pp. 7-9.